

**BASIC EDUCATION EXCHANGE (BEE)**  
**Sheraton Addis Hotel**  
**Addis Ababa, Ethiopia**  
**30 September-4 October 2002**

**WORKSHOP REPORT AND LESSONS LEARNED**

**BACKGROUND**

The Basic Education Exchange was originally scheduled for April/May 2002, but due to administrative delays, it was postponed to September/October 2002. The date change had knock-on effects like moving the venue from the Hilton Addis to the Sheraton Addis.

**PURPOSE/OBJECTIVES**

1. Manage logistic activities (pre-conference, during conference, post-conference)
2. Liaise with the Africa Bureau BEE Team.
3. Secure guestrooms and meeting rooms/facilities at the Sheraton Hotel as necessary.
4. Coordinate participant registration.
5. Coordinate participant arrival and departure.
6. Coordinate local contractor services.
7. Coordinate the cultural evening.
8. Coordinate the production and shipping of conference materials.
9. Manage the Secretariat to ensure adequate support for presenters and assistance to participants.
10. Coordinate the submission of presentations for uploading into laptops.
11. Coordinate with venue regarding A/V technical requirements.
12. Maintain an informative and attractive BEE website.

**SPECIFIC TASKS/ACTIVITIES**

**Venue**

From a purely logistics perspective, the Sheraton Addis hotel was exceptional. Both guestrooms and function rooms were of excellent quality, and the service exceptional. However, the degree of opulence represented by the hotel is in sharp contrast to the basic education needs of millions of marginalized Africans. The hotel's location in the middle of shanty dwellings was a constant reminder of this contradiction.

**Meeting Rooms**

All rooms were well appointed. However, the Awash I & II Salon was not appropriate for the BEE types of meetings.

**Equipment**

Except for the Barco Projector that projected inferior quality images, the audio-visual equipment was of acceptable quality overall. Despite the hotel's assurances that their equipment was "multi-system", the projector was not NTSC compatible, and presenters could not use some of their videos.

### **BEE Website**

Although the Africa Bureau insisted that the website be designed and made live early in the planning process, it delays in finalizing the Agenda meant that it was devoid of meaningful content until much later. Such delay gave visitors to the site the impression that the organizers were not ready, and thus did not compel early responses to the call for registrations.

### **Registration Process**

Initially the profile of the intended participant was clearly defined, but this became less so toward the end of the preparatory stage. Consequently, participant numbers fluctuated quite a lot. Participant registration was slow and only peaked around the deadline period, and after.

### **Presenters**

The identification of presenters was left until well into the final stages of the planning period, resulting in Agenda changes being made in the week before departure for Addis Ababa. These affected the team's ability to produce a final copy for binding in time to meet the shipping deadlines, and resulted in a second edition of the final copy.

### **Materials Shipment**

Shipping company, Matrix, did not provide adequate briefing on Ethiopian Customs regulations.

### **Visas**

Initially visa applications were problematic for participants from countries without an Ethiopian Consulate or Mission, but this was resolved by through the assistance of the USAID Mission in Ethiopia. The Mission's expeditors processed the applications with the Ethiopian Immigration Authority and, with a few exceptions, the visas were ready when participants arrived at Bole airport.

### **Country Clearances**

The process was delayed mainly because participants could not provide all the required information, particularly the travel itineraries. Some participants work for organizations that require a Country Clearance before authorizing funds to purchase tickets.

### **Hotel Sales Tax Exemption for USAID Staff**

Participants were misinformed that they would not be charged sales tax on their hotel expenses. Although it did not materially affect their finances, it was still an unnecessary irritant.

### **Language**

The virtually exclusive use of English was not well-received by the French-speaking participants. Efforts should have been made to provide French versions of some materials such as the Logistics and Welcome letters. Although the majority of written material would have still been in English, the gesture would have been appreciated.

### **Local Contractor**

Talent Search, the local contractor, performed very well in executing the specified deliverables. Yusuf Reja and his team showed commendable organizational competence, particularly in reproducing the Agenda and compiling the participant binders.

CAI could have derived greater value by asking the contractor to provide more deliverables such as liaison with Customs, Bus Hire, and Cultural Evening coordination.

### **Creative Support**

The BEE was successful to a large extent, because of the enterprise support Creative provided. This started with building a solid team comprising initially Tara Shariff, Sean Tate, Oriana Izquierdo, and Nigel Munyati; with Katy Anis eventually replacing Tara. Each brought a different skill and personality, generating the energy and chemistry that was ideal for the challenge. This was well-complemented by an adequate provision of financial and other material resources, creating the synergy that was clearly evident in the quality of Creative's logistics support for the BEE.

### **Kudos**

The BEE's success was also made easier to achieve through the support of several 'silent players':

Marta Maldonado and Angela Aldave: They provided critical graphic design support in the production of folders, binders, tote bags, posters, invitations, and certificates.

Margarita Torres: Her support with the preparation of contracts/purchase orders and financial transactions made our work much easier.

Alia Afshar: Alia worked diligently to help prepare the binders.

Ana Santos: Her help with travel and visa arrangements was a great help.

### **SCHEDULE**

Overall, scheduling was adequate. However, the early engagement of the Coordinator would have helped Creative staff to spend less (and unnecessary) time on the BEE, and spend more time on core tasks. This would also have helped the Coordinator to get in on the "ground floor", eliminating the need to spend time trying to catch-up.

Due to the delays in getting final Agenda, the team had to travel to Ethiopia earlier, incurring higher costs.

### **RESULTS/OUTCOMES**

Overall, the BEE was a success. Judging from the participant evaluations, they found the content very useful. Many confirmed that they had acquired new knowledge that they would share with colleagues, and implement in their own education delivery systems. Their general evaluation of the logistics was excellent.

### **LESSONS LEARNED**

#### **CONSULTANT**

1. Consultant should request detailed shipping and customs information from shipping company.
2. Consultant should clarify technical specifications on A/V equipment.

#### **CREATIVE**

1. Website should be designed to be more informative and encourage early registration.
2. Coordinator should be engaged early in the planning process.

## **USAID/AFRICA BUREAU**

The single most important lesson learned is that Creative must find a way to convince USAID/Africa Bureau to respond early on critical components such as Presenter identification, and Agenda finalization. Delays will drive costs up and compromise quality of materials.

The lessons learned from the most recent BEE conference are varied and fall into several categories. Many of the lessons could hardly be called "new" in terms of what it takes to implement a professional conference but they nevertheless bear repeating.

- 1. The Stars and the Stagehands:** While this may seem obvious, this first lesson is one of the most important to remember; hence it is listed first here. The essence of this work is that, whether assisting with technical (content) or logistical activities, we are "stagehands" in a dramatic production. We help to make the play happen; to run smoothly. We are not the "main actors" or even bit players. We can build (or bring) the sets, help actors run through their lines, adjust the lighting and the atmosphere of the stage, and make sure all "technical production values" are ready. We also can plan the finances, make sure the participants get to the drama, and "strike the set" (clean up) when the theater has closed.

The "credit" for a good dramatic production should only come spontaneously. If the production is a good one, then kudos and applause for the stagehands will come (and it has).

- 2. The Time and the Effort:** The amount of time (hours spent) required to "put on" a conference of this type is hard to estimate precisely; in the case of the BEE, it probably is 50 percent (minimum) more than anyone had planned. In retrospect, and thinking of the massive staff effort that was involved, that applies to the 2001 G/HCD conference in Washington as well. Organizing a conference is very labor intensive and time-consuming. Quality and kudos come from a lot of effort. Any attempts to short-cut the processes of preparation and implementation will lead to immediate...and long-term criticism. It is not easy.
- 3. The Overseas Factor:** The amount of time and effort required to prepare for and implement a conference, such as BEE, in an overseas location, such as Ethiopia, requires more time and effort than for an equivalent event held in the USA. Shipping materials, customs regulations, participant expectations for overseas USAID conferences, country clearances, employing translators, per diem amounts, security problems and a myriad other details add to the overall stress and effort of implementing a conference in another country.
- 4. The Flexibility Factor:** The organizing team must be ready for anything; and that means anything. Deadlines set are often not met. Materials shipped get stuck in customs. Participants get sick...and may even die. Participant lists can and will change, right up to the time the conference starts. The team must be flexible and ready to respond to crises, and even (as in the case of BEE) cancellation of the event.
- 5. The Organizing Team:** This was the "Sweety Team"; the "Green Team"(for the green dots we wore on our name badges at the BEE itself). It was a Sweety Team

because of the diverse talents of its members. Was this "planned"? Not really but we were exactly what was needed. What were the "ingredients" of this successful team"? Overall, the team members were and have to be able to be flexible and work together....and there has to be (working/living) experience in the cultures (of Africa, in this case) by some of the team members. There was no one person that was dominating or domineering in the group although each member rose to the occasion as the occasion required. There was collaboration; it was a "collaborative". There absolutely needs to be at least one person who deals with the nitty gritty of logistics, from participant lists to budgets. Nigel brought with him professional event planning; this was absolutely essential since none of the others had this kind of experience. Oriana was truly the "queen of logistics" and communications regarding the logistics, and also (with much credit to Tara Shariff) for budgetary planning and other support. This logistical work really requires two people; it is too much for just one person. Katy, who came on board only a short time before the BEE began, provided superb technical backstopping for all of the audio-video setups which are so crucial to such a conference. Nigel was also key for the technical backstopping during the conference, for graphics development and a myriad of other tasks. Sean's role was a stew of (1) long-term (and often sensitive) liaison with the Africa Bureau and with others at the BEE, (2) Public Relations, (3) communication (interagency, interpersonal), (4) crisis management, (5) writer, (6) basic laborer, (7) clean-up, (8) greeter, (9) writer of thank-you cards, and (10) technical/content support. On top of this, the team members were personally caring for the participants; true and sincere concern...with courtesy. None of the technical expertise would have mattered at all without this last human aspect. Was this an "ideal" team? There were differences and there were strains and stresses but overall the diverse talents of the team meshed somehow because there was respect within the team for each other as well as the client and the participants. It should be noted that about two weeks before the BEE was to begin, there was a request from USAID to "cut the Washington presence" and it was asked (of Sean) that one member of the organizing team be cut. This was firmly resisted (by Sean); it retrospect the lesson learned is that we needed all four people there. It would have been a disaster otherwise; skimping on "person power" for this labor intensive work (and any work like it) would have been counterproductive...and basically untenable.

**6. Time In-Country: Lesson:** The time required by the team to be in-country has to be expanded when the client/participants do not meet deadlines for submission of presentation materials.

**7. In-Depth Planning:** Planning for a conference of this type requires much time, in-depth attention to details, and an immense amount of effort.

**8. The Local Contractor:** Key to the success of this particular event was finding a good local contractor. In this case the contractor was the deceptively named "Talent Search", or more precisely one ball of Ethiopian energy named Yusuf Reja. Yusuf knew people and people know him; a true entrepreneur; cagey and shrewd businessman, and 'schmoozer' in all senses. His team of four young college women (Rodas Girma, Sinit Tsegaye, Selamawit Berhe, and Muluwork Befekadu), who had worked for Yusuf during the past year while their education was interrupted when the government totally closed Addis Ababa University), were outstanding. Yusuf and the team came through in crises, and facilitated everything from photocopying to arrangements for the "Cultural Night" at the Crown Hotel. Yusuf knowledge of Addis

Ababa's restaurants and night life were invaluable (and personally gratifying to the CALL team members). The lesson: an international conference needs a Yusuf; someone on the ground with intimate knowledge of the location, whom is reliable and who can also provide additional staff (the four CALL staff definitely needed the assistance of the four Ethiopian women and Yusuf to 'carry off' the conference. Again, this is labor intensive work.

**9. Translations:** Based on feedback from the BEE two years ago in Dakar, Senegal, where a lesson learned was that "simultaneous translation" was deemed cumbersome and not effective, in this BEE we asked the country missions to supply translators at our expense. The idea was to have these individual translators work with each country group and provide oral translations to the individuals coming from French-speaking countries. Orally, this appeared to work well. At the BEE itself, however, complaints arose because the printed materials did not appear in French. A bit of context is important: (1) approximately two weeks before the BEE was to begin, only 5 persons appeared to need translation services. Just as the BEE began, however, the number of persons needing translation had more than doubled.; (2) it would have been almost impossible to get all conference materials printed in French because very few printed materials, even in English, were available until the BEE actually began. Lesson: it WOULD have been good to have at least had all the "Welcome Packet" materials, the conference "Agenda" (The Program), and the website done in French as well as English. This should be done in the future. (It should be noted too that the agenda kept on changing for this BEE until the last minute as well.

**10. Parlez-vous 'Basic Education Exchange'?** After printing welcome letters, posters and other materials with the French translation of "Basic Education Exchange" (the translation of which we were assured was correct, as used in the BEE in Dakar two years ago), we found that even two years ago it was wrong. It is NOT "Echange de L'Education Fondamentale". It is "**Echange de L'Education du Base**". Lesson learned.

**11. Customarily:** When shipping materials from the USA to another country in Africa, pay the higher fee and have UPS or DHL (the principal international couriers in Ethiopia) do the shipping. They manage to take care of all customs duties etc efficiently (at least DHL did in the case of this BEE. What did not work was using a local (and purportedly reliable) shipper here in the USA (Matrix). Using the latter caused much grief when ring binders and other materials sent to the BEE in Addis Ababa got stuck in the Ethiopian customs agency. There are of course no guarantees with DHL either but...

**12. Post -Conference Shipping:** The lesson here is that there is a good possibility that the contractor (in this case Creative Associates) should arrange and pay for the shipping of conference documents by conference participants, after the conference, to the USAID country Missions. In the case of the BEE conference, the shipping was done through the diplomatic pouch services of the local USAID (Ethiopia) Mission. This may or may not be the case in future conferences and whether the pouch services can be used for this purpose should be investigated and verified long before the conference begins. (It appeared that there was an expectation that Creative Associates should have planned to do this). If it is necessary to use a private

shipper to ship personal conference materials (but not personal effects) then this must be a part of the conference organizers' budget.

**13. A Taxing Situation:** Prior to the BEE conference, we had been assured by the Sheraton Hotel that USAID direct hires would not have to pay sales tax on the hotel rooms and that all these participants would have to do would be to show an ID at the hotel and they would receive this "discount". Some participants were looking forward to this discount. In a moment of crisis on Day One of the BEE, when the first batch of nine participants arrived, the hotel staff on duty at reception said they could not grant this sales tax discount. The Duty Manager of the hotel pulled out a large book of Ethiopian government tax regulations and pointed to the specific reference to the 'bi-lateral' agreement between the USA and Ethiopia that permits such discounts ONLY to USAID staff members working in Ethiopia; not to other USAID employees outside Ethiopia. Lesson: be a burden to the country USAID mission and ask far ahead about taxes and discounts available to participants of the conference.

**13. USAID Employees at Overseas Missions: Saving Hotel Per Diem/Allowances.**

Until the BEE actually began, the organizing team assumed that USAID employees would not actually be able to save money on the hotel portion of their per diem. This turned out to be not true. In some cases, USAID Missions are apparently able to give conference participants lump sums covering hotel and per diem and the participants can actually save money by staying at a cheaper hotel. The participants see this as an opportunity to set aside monies for their own personal use. This actually happened at the BEE when a small group of people moved out of the Sheraton on the first day and moved to the nearby and cheaper Hilton Hotel. For a short time it appeared that other participants might do the same but this was 'headed off' by rapid word of mouth by the organizing team and Africa Bureau leaders. There is an important financial ramification of this kind of movement; hotels like the Sheraton require a guarantee for a set number of participants. If the number goes below that level then there are financial penalties (for the contractor). This is potentially a financially ruinous situation. Lesson: there is no legal way to prevent this kind of move but in all pre-conference literature to participants it should be emphasized that it is very important for conference participants to stay and be together in one location to promote teamwork and overall working together at the conference. The financial implications to the organizers of the conference can also be emphasized.

**15. "Being a Burden": The USAID Mission.** With all good intentions it was requested that we not burden the USAID Mission in Addis Ababa. In some ways, we actually should have used them more. The Mission would have been very useful with a number of activities (with which we struggled and then needed their help anyway). They could have helped more with customs, shipping, immigration and many other items.

**16. BEE Bags:** This is a "mixed bag" of a lesson. The simple white cotton "book bags" supplied to the participants initially received some grumpy comments, (e.g. "well, I guess I can use this to bring back vegetables from the market") but then totally accepted and used. It is true that participants in international conferences in Asia and Africa tend to expect the "usual", more upscale, briefcase-type bags from such conferences. In comparison the bags we provided looked "cheap". On the other hand (the more positive hand) the white cloth bags "could save money that is better spent on children's education". On the third hand, the conference was already being

held in a "Sheraton St Regis Luxury Collection Hotel." So maybe there should have been bags to match. It was a mixed bag.

**16. Special Needs:** Some participants asked for "special needs" diets at the conference. We did manage to get the hotel to accommodate these needs, principally meals and snacks for diabetics, after two days (although each day the hotel had to be reminded). Lesson: greater attention should be paid to this from the beginning of the event (and prior to it).

**17. Deadlines.** Deadlines were repeatedly set for presenters/participants to submit materials so they could be photocopied in the USA; the first set of deadlines was in late June. Other deadlines and "drop-deadlines" were also set...to no avail. Deadlines were also set for registration and submission of flight itineraries (for group country clearance approvals, which had to be done). Despite all of this, much of the materials came at the last minute. Our response...in retrospect, the correct one...was to ask presenters to bring their own multiple copies of their presentations; even then this did not always work. The Lesson: set early deadlines but be prepared for many late submissions of materials, and itineraries...and registrations. Be prepared...and be flexible.

**18. Cell Phones.** Lesson: a set of cell phones, one for each of the organizing committee members, is absolutely essential for coordinating the actual conference event itself. It is useful to have one person as "ground control" for these efforts.

**19. Thank You.** Lesson: It is important to bring to the conference 5 to 10 "Thank You" greeting cards. When the conference is finished, hand-written (more personal) words of appreciation should be written to key players (in the hotel or conference venue), in the local USAID Mission, for local contractor staff, and others. In addition, more official (typed, on letter head) letters of thanks should be sent to selected key players. Both the handwritten and the more official thank you cards/letters were completed for the BEE.

**20. Post BEE:** To ensure that momentum is sustained, the BEE Workshop Proceedings must be compiled and uploaded onto the BEE website.

**21. The Emergency Protocols:** Lesson. It is very important that protocols be established for the various types of emergency situations that might occur at such an event, such as a major illness, the death of a participant, a natural or man-made disaster or a security alert situation. These should be arranged, in detail, before the event begins. Key communication contact numbers/addresses must be available as part of these protocols, including family and professional emergency contact numbers and addresses for each participant as well as for relevant country missions and private organizations.

**22. The Care Factor:** The lesson here, which needs to be re-emphasized, is that the technical aspects of implementing a conference are important but the organizing team must always plan to go beyond just "getting the job done". It is not enough. Organizing a conference is much like operating a hotel...they are all part of the "hospitality industry" and sincere, gracious caring for the individuals involved in the conference. In this BEE event, this was nowhere better exemplified than in the work of Oriana Izquierdo who cared deeply for the health of a very ill participant from Mali.

(this is also a lesson for future conference organizers; expect the unexpected including illness and even death). The participant passed away one day after the conference ended; it was a sad and emotional time. Oriana was a model of professional effectiveness and efficiency but also of a care-giver whose humanity was visible to all.

**PEOPLE ARE LIKE TEA BAGS;  
YOU NEVER KNOW HOW STRONG THEY WILL BE UNTIL THEY ARE IN HOT WATER.**  
Rita Mae Brown